

Admin Mode: Institution, Expense Category & Merchant

Personal Finance Institution:

1. Click on the New link in the 'Finance' area of your Dashboard.

Finance		
Institution	New List Import from Excel	
Merchant	New List Import from Excel	
Types and Categories	New List	

2. On the **Create Institution** page, enter the required information such as Institution Name, Street, State, and Country. Then click on the **Save** button at the bottom of the page to store the information.

	Cre	eate Institution	
	Institu	ution Information	
Institution Name *	Demo Institution		
Remarks About 3000 characters left			.::
Street 1 * City County County * State * Phone 1 Phone 2 Fax Number Web Address	Ist street	Street 2 Zip Code Other Ext Ext E-mail	
Cancel			Save

3. You will then receive a Success Message.

i Successfully Saved.



Personal Finance Expense:

1. Click on the New link in the 'Finance' area of your Dashboard.

Finance				
Institution	New List Import from Excel			
Merchant	New List Import from Excel			
Types and Categories	New List			

2. Enter the information in the 'Label' and 'Description' fields on the **Types and Categories** page and click on the **Save** button.

Types and Categories Type Information				
Expense	-	Bread	Food	
Deposit				
Please Select Account				
Deposit				If you want to add more row,
Expense				click on "Add More"
Unit]		Add More 🕂
Cancel				

NOTE: To add more rows, click on the Add More button.

3. You will then receive a Success Message.



Merchant:

 To create a new Merchant, click on the New link in the 'Finance' area of Dashbaord.

2. Enter the data in the fields as required and click on the 'Save' button at the bottom of the page.

Finance				
Institution	New List Import from Excel			
Merchant	New List Import from Excel			
Types and Categories	New List			



Create Merchant					
	Merchant Information				
Organization Name *	Demo organizati	on			
Remarks					
About 3000 characters left					
Street 1 *	Street 1		Street 2		
City	birddr 1				
County			Zip Code		
Country *	USA	-	Other		
State *	NEW JERSEY	-			
Phone 1		0	Ext		
Phone 2		0	Ext		
Fax Number			E-mail		
Web Address					
Cancel				Save	

3. You will receive a Success Message when the data is saved.

i Successfully Saved.	
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Edit List of Institutions, Expense Categories or Merchants:

You can edit the list of Institutions, Expense Categories or Merchants from the respective lists.

For example: To edit an entry in the list of **Institutions**, follow the steps shown.

Finance			
Institution	New List Import from Excel		
Merchant	New List Import from Excel		
Types and Categories	New List		

1. On the **Personal Finance Institution** list, click on the name of the Institution.

Personal Finance Institution					
Institution 🔺	Entered By	Entered Date 🔶	Updated By 🗢	Updated Date	\$

 Make the necessary changes on the form and click on the Save button to update the form.



		Edit	Institution	
		Institutio	n Information	
Institution Name *	ABC Institution			
Remarks				
About 3000 characters left				***
Street 1 *	517 First Street		Street 2	
City	Small Town City			
County			Zip Code	
Country *	USA	-	Other	
State *	CONNECTICUT	•		
Phone 1	111-222-3333	0	Ext	123
Phone 2		0	Ext	
Fax Number	225-336-4447		E-mail	abcinst@abc.com
Web Address	www.abc.com			
« Back Cancel				Save

3. You will then receive a Success Message.

Successfully Updated.	
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Importing Data from Excel Sheets:

You can import data directly into the forms from Excel Sheets.

For example, to Import Merchant from Excel sheets follow the steps shown below.

 On your Dashboard, click on the Import from Excel link in the 'Finance' section.

Finance							
Institution	New List Import from Excel						
Merchant	New List Import from Excel						
Types and Categories	New List						



			Import Mercha	nt From Excel	
Fil	e:				
File:		Download	a sample excel file (with	(1) supported format and hel	(9
noose file				?	(4) Save
Look in:	My Documer	nts er		▲ ==-	
My Recent Documents	My Network EXCEL1.xls	.Places			«Feedback» «Live Help» «Help»
Desktop					
ly Documents					
My Computer					
		-		~	
My Network	File name:	excel/iew.xls		🗸 🔇 Open	

2. To add the information from the Excel sheet, click on the 'Browse' button on the **Import Merchant From Excel** page. After selecting the file from your computer, click on the 'Open' button to add the file and then click on the 'Save' button.

NOTE: You can download a sample Excel file by clicking on the **Download a sample excel file** (with supported format and help). The Excel file to be uploaded should be written in the order shown in the sample Excel file.

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	Clipboard 🕞		Font	9	Alignme	nt	6	Number	6	Styles		Cells		Ed	iting		3
	M14 -	· (•	f _x														
-	A	В	С	D	E	F	G	Н	- I	J	K	L	M	N	C)	
1	Organization Name	Remarks	Street1	Street2	City	State	County	y Zip	Country	Country Other	Phone1	Ext1	Phone2	Ext2	Fax		Em
2	ABC Organization		Street 1			Connecticut		06000	USA		111-222-333	3 123					abc
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3. The data will then be entered into the form automatically.

	,	rerenan	r mormation	
Organization Name *	ABC Organization			
lemarks				
About 3000 characters left				
		_		
Street 1 *	Street 1		Street 2	
County			Zin Code	05000
Country *	1154	1	Other	06000
State *	CONNECTICUT	1		
Phone 1	111-222-2222	0	Ext	122
Phone 2	111-222-5555	ŏ	Ext	125
Fax Number		1	E-mail	abc@ab.com
Web Address	www.abc.com			